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February 4, 2014

To: Supervisor Don Knabe, Chairman
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          Supervisor Michael D. Antonovich

From: William T Fujioka
          Chief Executive Officer

QUARTERLY UPDATE ON THE IMPROVEMENTS TO THE COUNTY CONTRACTING PROCESS

The Chief Executive Office (CEO) is continuing on a countywide project to develop a Countywide Contract Management System (CCMS). This memo briefly summarizes efforts that occurred on the project during the Third Quarter of 2013.

Project Scope

The CEO, County Counsel (Co-Co), Auditor-Controller (A-C), Internal Services Department (ISD), and other County departments have been working on the development and implementation of the CCMS project. The scope and overall design of CCMS has been focused in the areas below:

1. Contract solicitation and award document creation, workflow and maintenance (Case Management System [CMS]);
2. Standardizing the County's standard terms and conditions; and
3. Creation of a contract document repository (Contract Library System [CLS]).

Project Status

To date, various stages of the CCMS project development and implementation have been accomplished, which includes the following:

1. <u>Document Creation, Workflow, and Maintenance</u>

   This component of CMS establishes a common process and procedures that all departments must use when moving through the contracting process. This ensures compliance with County policies, procedures, controls and provides a means for common data for management, monitoring, and analysis.

   <u>Current Status</u>:

   Standard contracting processes, analyst roles and responsibilities, and workflows have been defined in CMS, with the ability to configure to any special departmental requirements.

   - ISD's model contracting documents and clauses with the standard County terms and conditions will be available for solicitation and award document creation by February 2014.

   - ISD's current Master Agreement solicitation (Request For Statement of Qualifications [RFSQ]) for elevator/escalator repair services, has been loaded into the CMS and responses, which are due June 7th, will be inputted into CMS for evaluation.

   - The Department of Parks and Recreation will pilot the first Proposition "A" contract solicitation (for landscape services) during the Fourth Quarter of FY 2013-14.

   - Community and Senior Services' (CSS) standard contracting documents and clauses with standard "social services" terms and conditions, will be available for its solicitation and award document creation by the end of January 2014. CSS is in the planning stages for the solicitation of a consulting services contract for the First Quarter of FY 2014-15.

2. <u>Standardizing the County's Standard Terms and Conditions</u>

   The development of standard content (e.g., templates, terms and conditions) for use by departments provides for consistency across departments for similar types of contracts.

Current Status:

ISD's model contracting documents and clauses with the standard County terms and conditions for Proposition "A" contracts will be available in CMS for contracting document creation by February 2014.

CSS standard contracting documents and clauses with standard "social services" terms and conditions will be available for its solicitation and award document creation by February 2014.

3. Creation of a Contract Library System

The CLS component provides for a central repository for which the monitoring, retrieval, and reporting of departmental contract information is on a countywide basis rather than only on an individual department basis.

Current Status:

ISD's model contracting clauses (standard County terms and conditions) are scheduled to be loaded into the CLS production environment in February 2014.

CSS' existing 14 contract templates with County Counsel-approved terms and conditions for its "social services" contracts are scheduled to be loaded into the CLS production environment by the end of January 2014.

Next Steps

The project team will continue to work with County departments to develop implementation tasks and schedules, with a priority on Proposition "A" contracts that will be solicited in FY 2014-15. Using a standardized implementation checklist/protocol (attached) will facilitate a consistent process for implementing departments onto CCMS.

Additionally, the A-C along with ISD is working to build the capacity of all departments to effectively monitor their contracts. ISD, A-C, and CoCo have developed an excellent four-hour monitoring training module that is presented as part of their quarterly two-day contract managers training. This block of training has been presented to 248 DCFS employees and 155 DCFS contractors, as well as employees from other departments. Concurrent to the training, the A-C has been actively assisting DCFS to establish a Fiscal Assessment Unit and is providing specialized training to staff on using assessment tools that were developed for their departmental operations.

Lastly, the A-C and ISD are working to meet the increased demand from departments for appropriately trained staff to conduct monitoring. In response, they are designing a comprehensive, 32-hour Contract Monitoring Certification Program that will develop the skills of department fiscal, contract, and program staff to perform routine monitoring. The Certification Program is on schedule to be completed by the spring of 2014 and will be available for all departments to send staff to these training sessions.

The next quarterly status update on this project will be provided in April 2014. If you have any questions or need additional information, please contact Scott Wiles of my staff at (213) 893-1246 or at swiles@ceo.lacounty.gov .

WTF:SHK:SAW:cg

Attachment

c: Executive Office, Board of Supervisors
      County Counsel
      Auditor-Controller
      Community and Senior Services
      Health Services
      Internal Services

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Countywide Contract Management System (CCMS) Project

Department Implementation Check List

Phase	Activity	Principle Implementation Group	Support Group	Completion Date
Planning & Management	Project Kick-Off and Planning	AC\ISD	Dept Implementation Team	
	Customize Project Plan\Task List	AC\ISD	Dept Implementation Team	
Envision	Product training for project team; includes CLS and CMS	AC/ISD	Dept Implementation Team	
	Business process definition and planning. Align current Department and County Counsel operations with project roles i.e. Librarian, Dept. Librarian, Contract Analyst, Contract Mgr., Approvers, etc. in CLS and CMS	Dept Implementation Team	AC\ISD	
	Data Conversion/Acquisition – Planning; Examples (1) Review existing folder structure in CLS; (2) identify clauses from Dept. to be hosted in CLS; (3) Review ISD solicitation and contract model documents in CLS	Dept Implementation Team	AC\ISD	
	End User – Planning; Identify end users by role – Dept. Librarians, Contract Analysts, Contract Mgrs., Approvers, Inquiry Users.	AC/ISD	Dept Implementation Team	
	End User Training - Planning	Dept Implementation Team	AC/ISD	
	Operational Readiness Assessment – Confirm network connectivity to CLS and CMS; Confirm workstations meet minimum requirements.	Dept Implementation Team	AC/ISD	
	End User Support (Help Desk) - Planning	AC/ISD	Dept Implementation Team	
Create	Optional – Load clauses for Dept.	AC/ISD	Dept Implementation Team	
	Optional – Dept. Librarian creates clauses and templates directly in CLS	Dept Implementation Team	AC/ISD	
	CLS Configuration and Set-up; End users including assignment of security and workflow.	AC/ISD	Dept Implementation Team	
	Case Mgt. Configuration and Set-up; End users including assignment of security and workflow.	AC/ISD	Dept Implementation Team	
	Verify Security & Workflow Set-up; CLS and Case Mgt.	Dept Implementation Team	AC/ISD	
	Training Environment Set-up	AC/ISD		

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	End User Training	AC/ISD	Dept Implementation Team	
	Complete logistics for End-User Support	AC/ISD	Dept Implementation Team	
	Confirm Implementation – Go Live Schedule	Dept Implementation Team	AC/ISD	
Achieve	Implementation Cutover – Complete remaining cut over tasks	AC/ISD	Dept Implementation Team	
	Conduct ongoing assessment of CLS and Case Mgt. systems from Dept and County Counsel; define system and config. changes	AC/ISD	Dept Implementation Team	
Post-Implementation	Help Desk/User Support	AC/ISD	Dept Implementation Team	

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